



THRIFT SAVINGS PLAN INTERFUND TRANSFER REQUEST

TSP-30

Use this form *only* if you want to change the way the balance currently in your Thrift Savings Plan (TSP) account is invested in the three TSP funds. (To change the way future contributions to your account are invested, you must submit a new Election Form (TSP-1) to your agency employing office.) You may make 12 interfund transfers in a calendar year. Before completing this form, please read the information on the back. **Type or print** all information. Mail the completed form to:

Thrift Savings Plan Service Office
National Finance Center
P.O. Box 60012
New Orleans, LA 70160-0012

Forms received by the TSP Service Office by the 15th of the month will be effective as of the last day of that month. Forms received after the 15th will be effective as of the last day of the following month. **DO NOT submit this form to your agency. Your agency cannot process it.**

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|---|------------------------|------|-------|------------------|
| I. INFORMATION ABOUT YOU | 1. Name | | | |
| | | Last | First | Middle |
| | 2. Social Security No. | | | 3. Date of Birth |
| | | | | Month Day Year |

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|---|--|---------------------------------------|--------|
| II. YOUR TRANSFER DECISION | Show how you want your current account balance to be divided among the G, F, and C Funds as a result of the interfund transfer. Enter the percentage (in multiples of 5%) of your account balance that you want to be invested in each of the funds. Do not use dollar amounts. The total of Items 4, 5, and 6 must equal 100%. The percentages that you choose will be applied to the total balance in your account (including, if you are a FERS employee, your Agency Automatic (1%) and Matching Contributions) they will not apply to future contributions or earnings. | | |
| | 4. G Fund | Government Securities Investment Fund | .0% |
| | 5. F Fund | Fixed Income Index Investment Fund | .0% |
| | 6. C Fund | Common Stock Index Investment Fund | .0% |
| | Total | | 100.0% |

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| III. ACKNOWLEDGE- MENT OF RISK | If you invest in either the F or C Fund, sign Item 7. |
| | I have chosen to invest in the F and/or C Fund. I understand that I am making this investment at my own risk. I also understand that I am not protected by either the U.S. Government or the Federal Retirement Thrift Investment Board against investment loss in the F or C Fund, and that neither the U.S. Government nor the Federal Retirement Thrift Investment Board guarantees a return on my investment. |
| Also sign Section IV. | |
| | 7. _____ Participant's Signature |

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| IV. SIGNATURE | You must sign Item 8 and date Item 9; otherwise, your interfund transfer will not be processed. Mail the completed form, with your original signature, to the TSP Service Office at the address at the top of this form. Do not send a photocopy of the signed form. | |
| | 8. _____ Participant's Signature | 9. _____ Date Signed |
| | 10. _____ Daytime Phone (Area Code and Number) | Check one: <input type="checkbox"/> Office <input type="checkbox"/> Residence |

PRIVACY ACT NOTICE. We are authorized to request this information under 5 U.S.C. Chapter 84. Executive Order 9397 authorizes us to ask for your Social Security number, which will be used to identify your account. We will use the information you provide to process your interfund transfer request. This information may also be shared with other Federal agencies to administer your account or for statistical, auditing, or archiving purposes. In addition, we may share the information with law enforcement agencies investigating, prosecuting, or enforcing a violation of civil or criminal law or

with other agencies for the purpose of implementing a statute, rule, or order. It also may be shared with Congressional offices, the TSP annuity vendor, retirement plan sponsors, auditing firms, spouses, former spouses, beneficiaries, persons responsible for your care, and representatives of your estate. It also may be released in response to a court subpoena or to appropriate parties preparing for or engaged in litigation affecting your TSP account. You are not required by law to provide this information but if you do not provide it, it may not be possible to process the actions you request by this form.

Making an Interfund Transfer

An interfund transfer changes the way your TSP account is invested in three TSP funds. Each interfund transfer is a one-time transaction and affects your entire account balance as of the effective date of the transfer.

Number of transfers per year. You can make an interfund transfer up to 12 times in any calendar year.

Requesting a transfer. You can request an interfund transfer in two ways:

- **Form TSP-30.** Complete, sign, and date the front of this form. If you invest in the F or C Fund, be sure to read the acknowledgement of risk (Section III) carefully before you sign it. There is a risk of investment loss in both the F and C Funds.

Provide your daytime telephone number, so that the TSP Service Office can contact you if there is a question about your request. Make a copy for your records, and send the form with your original signature to the TSP Service Office at the address on the front of the form.

- **TSP ThriftLine (504) 255-8777.** The ThriftLine is the most efficient way to request an interfund transfer. Call the ThriftLine from a touch-tone telephone; you will need your Social Security number and your Personal Identification Number (PIN). Your request is recorded immediately, avoiding mailing and processing time.

You are eligible to use the ThriftLine for interfund transfers if you have ever invested in the F or C Fund. If you have not, you can use the ThriftLine to have an acknowledgement of Risk form mailed to you. The deadlines and effective dates of all transactions on the ThriftLine -- transfer request, change, and cancellation -- are the same as those for Form TSP-30.

Note: Your Social Security number and date of birth on Form TSP-30 must match the information that is in your TSP account record, or your interfund transfer cannot be processed.

Confirmation of your transfer will be mailed to you at the address in your TSP account records. If your address or other personal information is not correct on your most recent Participant Statement, contact your agency personnel office immediately to have it corrected. If you have left Government service, contact the TSP Service Office.

Effective date of the transfer. If your Form TSP-30 is received by the TSP Service Office by the 15th of a month, it will be effective as of the last day of that month. (If the 15th day of the month falls on a weekend, holiday, or other nonbusiness day, the deadline will be the next business day.) If your form is received after the deadline, the transfer will be made effective as of the last day of the following month.

Investment Considerations

How to find out your current account balance. Call the ThriftLine to find out your current account balance and how your account is distributed among the three funds.

What to consider before making an interfund transfer.

Your TSP account is invested for your retirement, and you should make your investment decisions with this long-term goal in mind. Before you make an interfund transfer, carefully review all of the available information so that you understand the risks involved and the possible effects of your decision on your TSP account.

Information about the TSP funds. Read the *Summary of the Thrift Savings Plan for Federal Employees*, which describes each of the funds in detail and provides a 10-year history of investment returns on corresponding securities. The Plan Summary is available from your agency personnel office or, if you have left Government service, from the TSP Service Office.

In addition, your Participant Statement and the *TSP Highlights* that accompany it provide the most recent 10-year performance summary, as well as monthly detail on the TSP funds and related securities and indexes.

Confirmation of the Transfer

How we will confirm your transfer. You will receive a Confirmation of Interfund Transfer (Form TSP-31) from the TSP Service Office by the end of the month following the transfer.

If you have questions about the transfer. If you have questions about your interfund transfer, or if you do not receive Form TSP-31, contact the TSP Service Office. Your agency is not involved in processing interfund transfers.

Changing or Cancelling a Transfer

Changing a transfer request on Form TSP-30. Submit another Form TSP-30 to the TSP Service Office. If your second request is received by the deadline for the month in which your original request would have been effective, it will replace the previous Form TSP-30. If it is received after the deadline for that month, the original request will be processed as scheduled. Your second interfund transfer request will be effective as of the end of the following month.

Cancelling a transfer request in writing. Notify the TSP Service Office in writing that you want to cancel your interfund transfer request. Your letter must be dated and signed by you and must include your Social Security number and date of birth. You should also provide your daytime telephone number. The TSP Service Office must receive your letter by the deadline for the month in which the transfer would have been effective. You will receive notice of the cancellation.

Changing or cancelling requests on the ThriftLine. You can use the ThriftLine to change or cancel your interfund transfer request. Transfer requests made on the ThriftLine can always be changed or cancelled using the ThriftLine (by the deadline) because they are recorded immediately. However, if you have requested a transfer on Form TSP-30 but the recordkeeper has not recorded it by the 15th of the month, you will not be able to cancel or change your request on the ThriftLine.